



County of Kaua'i  
Department of Finance  
Real Property Assessment Division

4444 Rice Street, Suite A-454  
Līhu'e, Kaua'i, HI 96766-1326  
Phone: (808) 241-4224  
Website: kauaipropertytax.com

**2017 HOME PRESERVATION TAX LIMITATION APPLICATION**  
**(Application Filing Deadline: September 30th)**

**Part 1: Home Exemption Qualification**

**YES NO**

- A. Has a Home Exemption been in existence on or before 2006 (10 year minimum) on this property, without change in ownership, other than transfers between family members?

**And** does subject property have a current or qualify for homestead tax rate?

- B. Dwelling(s) on the property, is/are occupied by an owner-occupant?  
C. Does real property have a net taxable assessed value exceeding \$750,000?  
D. Is the gross income of all owners \$100,000 or less?  
E. Are the real property taxes current on the Homeowner's property?  
F. The property at issue in this application, is the only property owned by the Applicant/Title Owner.

If items A through E of the above are marked "Yes", please proceed.

If any of the above are marked "No" with exception of item "F", DO NOT PROCEED, you are **NOT** eligible for a credit.

**Part II: Title Owners Total Gross Income for 2015 INCOME TAX YEAR**

- H. Enter the total GROSS INCOME of all title owners \$ \_\_\_\_\_  
(State and Federal Tax Returns attached for 2015 Income Tax Year for all title owners)  
(Attach pages 1 & 2, Schedules C, D, E, F, if applicable, of all Federal Returns and pages 1 - 4 of all Hawai'i State Returns or complete an Affidavit, for any title owners do not file Federal or State Income Tax or both.) **\*\*Signed Authorization of Request for Transcript of Tax Return (Form 4506-T) Department of the Treasury, Internal Revenue Service-OMB No. 1545-1872, is a qualification requirement.**

**Part III: Calculation**

- I. Enter 3% of TOTAL GROSS INCOME (Multiply Line H Part II by .03) \$ \_\_\_\_\_  
Your real property taxes are the higher of the amount appearing on Line I or \$500.00)

**Part IV: Applicant Information**

1. Tax Map Key No./Parcel ID: (4) \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_  
Kaua'i Zone Section Plat Parcel CPR/HPR
2. Applicant's Name: \_\_\_\_\_
3. Social Security Number \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ Date of Birth: mm \_\_\_\_ dd \_\_\_\_ yy \_\_\_\_\_
4. Mailing Address: \_\_\_\_\_  
City/State/Zip: \_\_\_\_\_
5. Home Phone: \_\_\_\_\_ Bus. Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_  
Email address: \_\_\_\_\_

**Part V: Certification (One application to be completed and signed by each title owner)**

**I hereby certify that I am a qualified homeowner, that the information above is true and correct, and that the tax return submitted with this application is a true and correct copy. I authorize the County of Kaua'i to verify my income or other information on this application with the State Tax Office or Internal Revenue Service. Any person who falsifies and misrepresents any information in meeting requirement of Chapter 5A-11.A2(c) shall be fined \$1,000 or imprisoned for not more than one year or both.**

Signature

Date

SOCIAL SECURITY NUMBER: The applicant's social security number is requested for the purpose of establishing the identity of the applicant for Property Tax Credit and maintaining a record of Tax Credit Claims. The request is authorized under the Federal Social Security Act (42 U.S.C.A. Sec. 405c 2). Disclosure is voluntary and will not affect the allowance of claim for a Tax Credit, but failure to disclose may result in a delay of processing the claim. If disclosed, social security number will not be subject to public access.

**Request for Transcript of Tax Return**

OMB No. 1545-1872

(Rev. September 2015)  
Department of the Treasury  
Internal Revenue Service

- ▶ Do not sign this form unless all applicable lines have been completed.  
▶ Request may be rejected if the form is incomplete or illegible.  
▶ For more information about Form 4506-T, visit [www.irs.gov/form4506t](http://www.irs.gov/form4506t).

**Tip.** Use Form 4506-T to order a transcript or other return information free of charge. See the product list below. You can quickly request transcripts by using our automated self-help service tools. Please visit us at [IRS.gov](http://IRS.gov) and click on "Get a Tax Transcript..." under "Tools" or call 1-800-908-9946. If you need a copy of your return, use Form 4506, Request for Copy of Tax Return. There is a fee to get a copy of your return.

<b>1a</b> Name shown on tax return. If a joint return, enter the name shown first.	<b>1b</b> First social security number on tax return, individual taxpayer identification number, or employer identification number (see instructions)
<b>2a</b> If a joint return, enter spouse's name shown on tax return.	<b>2b</b> Second social security number or individual taxpayer identification number if joint tax return
<b>3</b> Current name, address (including apt., room, or suite no.), city, state, and ZIP code (see instructions)	
<b>4</b> Previous address shown on the last return filed if different from line 3 (see instructions)	
<b>5</b> If the transcript or tax information is to be mailed to a third party (such as a mortgage company), enter the third party's name, address, and telephone number.	

**County of Kaua'i, Real Property Assessment, 4444 Rice St, Suite A-454, Lihu'e, Kaua'i, HI 96766-1326**

**Caution:** If the tax transcript is being mailed to a third party, ensure that you have filled in lines 6 through 9 before signing. Sign and date the form once you have filled in these lines. Completing these steps helps to protect your privacy. Once the IRS discloses your tax transcript to the third party listed on line 5, the IRS has no control over what the third party does with the information. If you would like to limit the third party's authority to disclose your transcript information, you can specify this limitation in your written agreement with the third party.

**6 Transcript requested.** Enter the tax form number here (1040, 1065, 1120, etc.) and check the appropriate box below. Enter only one tax form number per request. ▶ 1040

**a Return Transcript**, which includes most of the line items of a tax return as filed with the IRS. A tax return transcript does not reflect changes made to the account after the return is processed. Transcripts are only available for the following returns: Form 1040 series, Form 1065, Form 1120, Form 1120-A, Form 1120-H, Form 1120-L, and Form 1120S. Return transcripts are available for the current year and returns processed during the prior 3 processing years. Most requests will be processed within 10 business days . . . . .

**b Account Transcript**, which contains information on the financial status of the account, such as payments made on the account, penalty assessments, and adjustments made by you or the IRS after the return was filed. Return information is limited to items such as tax liability and estimated tax payments. Account transcripts are available for most returns. Most requests will be processed within 10 business days . . . . .

**c Record of Account**, which provides the most detailed information as it is a combination of the Return Transcript and the Account Transcript. Available for current year and 3 prior tax years. Most requests will be processed within 10 business days . . . . .

**7 Verification of Nonfiling**, which is proof from the IRS that you did not file a return for the year. Current year requests are only available after June 15th. There are no availability restrictions on prior year requests. Most requests will be processed within 10 business days . . . . .

**8 Form W-2, Form 1099 series, Form 1098 series, or Form 5498 series transcript.** The IRS can provide a transcript that includes data from these information returns. State or local information is not included with the Form W-2 information. The IRS may be able to provide this transcript information for up to 10 years. Information for the current year is generally not available until the year after it is filed with the IRS. For example, W-2 information for 2011, filed in 2012, will likely not be available from the IRS until 2013. If you need W-2 information for retirement purposes, you should contact the Social Security Administration at 1-800-772-1213. Most requests will be processed within 10 business days . . . . .

**Caution:** If you need a copy of Form W-2 or Form 1099, you should first contact the payer. To get a copy of the Form W-2 or Form 1099 filed with your return, you must use Form 4506 and request a copy of your return, which includes all attachments.

**9 Year or period requested.** Enter the ending date of the year or period, using the mm/dd/yyyy format. If you are requesting more than four years or periods, you must attach another Form 4506-T. For requests relating to quarterly tax returns, such as Form 941, you must enter each quarter or tax period separately.

12	/	31	/	2015	/	/	/	/
----	---	----	---	------	---	---	---	---

**Caution:** Do not sign this form unless all applicable lines have been completed.

**Signature of taxpayer(s).** I declare that I am either the taxpayer whose name is shown on line 1a or 2a, or a person authorized to obtain the tax information requested. If the request applies to a joint return, at least one spouse must sign. If signed by a corporate officer, 1 percent or more shareholder, partner, managing member, guardian, tax matters partner, executor, receiver, administrator, trustee, or party other than the taxpayer, I certify that I have the authority to execute Form 4506-T on behalf of the taxpayer. **Note:** For transcripts being sent to a third party, this form must be received within 120 days of the signature date.

☐ Signatory attests that he/she has read the attestation clause and upon so reading declares that he/she has the authority to sign the Form 4506-T. See instructions.

Phone number of taxpayer on line 1a or 2a

**Sign Here**

Signature (see instructions)

Date

Title (if line 1a above is a corporation, partnership, estate, or trust)

Spouse's signature

Date

Section references are to the Internal Revenue Code unless otherwise noted.

## Future Developments

For the latest information about Form 4506-T and its instructions, go to [www.irs.gov/form4506t](http://www.irs.gov/form4506t). Information about any recent developments affecting Form 4506-T (such as legislation enacted after we released it) will be posted on that page.

## General Instructions

**Caution:** Do not sign this form unless all applicable lines have been completed.

**Purpose of form.** Use Form 4506-T to request tax return information. You can also designate (on line 5) a third party to receive the information. Taxpayers using a tax year beginning in one calendar year and ending in the following year (fiscal tax year) must file Form 4506-T to request a return transcript.

**Note:** If you are unsure of which type of transcript you need, request the Record of Account, as it provides the most detailed information.

**Tip.** Use Form 4506, Request for Copy of Tax Return, to request copies of tax returns.

**Automated transcript request.** You can quickly request transcripts by using our automated self-help service tools. Please visit us at [IRS.gov](http://IRS.gov) and click on "Get a Tax Transcript..." under "Tools" or call 1-800-908-9346.

**Where to file.** Mail or fax Form 4506-T to the address below for the state you lived in, or the state your business was in, when that return was filed. There are two address charts: one for individual transcripts (Form 1040 series and Form W-2) and one for all other transcripts.

If you are requesting more than one transcript or other product and the chart below shows two different addresses, send your request to the address based on the address of your most recent return.

## Chart for individual transcripts (Form 1040 series and Form W-2 and Form 1099)

If you filed an individual return and lived in:	Mail or fax to:
Alabama, Kentucky, Louisiana, Mississippi, Tennessee, Texas, a foreign country, American Samoa, Puerto Rico, Guam, the Commonwealth of the Northern Mariana Islands, the U.S. Virgin Islands, or A.P.O. or F.P.O. address	Internal Revenue Service RAIVS Team Stop 6716 AUSC Austin, TX 73301
Alaska, Arizona, Arkansas, California, Colorado, Hawaii, Idaho, Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Montana, Nebraska, Nevada, New Mexico, North Dakota, Oklahoma, Oregon, South Dakota, Utah, Washington, Wisconsin, Wyoming	Internal Revenue Service RAIVS Team Stop 37106 Fresno, CA 93888
Connecticut, Delaware, District of Columbia, Florida, Georgia, Maine, Maryland, Massachusetts, Missouri, New Hampshire, New Jersey, New York, North Carolina, Ohio, Pennsylvania, Rhode Island, South Carolina, Vermont, Virginia, West Virginia	Internal Revenue Service RAIVS Team Stop 6705 P-6 Kansas City, MO 64999
	816-292-6102

## Chart for all other transcripts

If you lived in or your business was in:	Mail or fax to:
Alabama, Alaska, Arizona, Arkansas, California, Colorado, Florida, Hawaii, Idaho, Iowa, Kansas, Louisiana, Minnesota, Mississippi, Missouri, Montana, Nebraska, Nevada, New Mexico, North Dakota, Oklahoma, Oregon, South Dakota, Texas, Utah, Washington, Wyoming, a foreign country, American Samoa, Puerto Rico, Guam, the Commonwealth of the Northern Mariana Islands, the U.S. Virgin Islands, or A.P.O. or F.P.O. address	Internal Revenue Service RAIVS Team P.O. Box 9941 Mail Stop 6734 Ogden, UT 84409
Connecticut, Delaware, District of Columbia, Georgia, Illinois, Indiana, Kentucky, Maine, Maryland, Massachusetts, Michigan, New Hampshire, New Jersey, New York, North Carolina, Ohio, Pennsylvania, Rhode Island, South Carolina, Tennessee, Vermont, Virginia, West Virginia, Wisconsin	Internal Revenue Service RAIVS Team P.O. Box 145500 Stop 2800 F Cincinnati, OH 45250
	859-669-3592

**Line 1b.** Enter your employer identification number (EIN) if your request relates to a business return. Otherwise, enter the first social security number (SSN) or your individual taxpayer identification number (ITIN) shown on the return. For example, if you are requesting Form 1040 that includes Schedule C (Form 1040), enter your SSN.

**Line 3.** Enter your current address. If you use a P.O. box, include it on this line.

**Line 4.** Enter the address shown on the last return filed if different from the address entered on line 3.

**Note:** If the addresses on lines 3 and 4 are different and you have not changed your address with the IRS, file Form 8822, Change of Address. For a business address, file Form 8822-B, Change of Address or Responsible Party — Business.

**Line 6.** Enter only one tax form number per request.

**Signature and date.** Form 4506-T must be signed and dated by the taxpayer listed on line 1a or 2a. If you completed line 5 requesting the information be sent to a third party, the IRS must receive Form 4506-T within 120 days of the date signed by the taxpayer or it will be rejected. Ensure that all applicable lines are completed before signing.



**You must check the box in the signature area to acknowledge you have the authority to sign and request the information. The form will not be processed and returned to you if the box is unchecked.**

**Individuals.** Transcripts of jointly filed tax returns may be furnished to either spouse. Only one signature is required. Sign Form 4506-T exactly as your name appeared on the original return. If you changed your name, also sign your current name.

**Corporations.** Generally, Form 4506-T can be signed by: (1) an officer having legal authority to bind the corporation, (2) any person designated by the board of directors or other governing body, or (3) any officer or employee on written request by any principal officer and attested to by the secretary or other officer. A bona fide shareholder of record owning 1 percent or more of the outstanding stock of the corporation may submit a Form 4506-T but must provide documentation to support the requester's right to receive the information.

**Partnerships.** Generally, Form 4506-T can be signed by any person who was a member of the partnership during any part of the tax period requested on line 9.

**All others.** See section 6103(e) if the taxpayer has died, is insolvent, is a dissolved corporation, or if a trustee, guardian, executor, receiver, or administrator is acting for the taxpayer.

**Note:** If you are Heir at law, Next of kin, or Beneficiary you must be able to establish a material interest in the estate or trust.

**Documentation.** For entities other than individuals, you must attach the authorization document. For example, this could be the letter from the principal officer authorizing an employee of the corporation or the letters testamentary authorizing an individual to act for an estate.

**Signature by a representative.** A representative can sign Form 4506-T for a taxpayer only if the taxpayer has specifically delegated this authority to the representative on Form 2848, line 5. The representative must attach Form 2848 showing the delegation to Form 4506-T.

**Privacy Act and Paperwork Reduction Act Notice.** We ask for the information on this form to establish your right to gain access to the requested tax information under the Internal Revenue Code. We need this information to properly identify the tax information and respond to your request. You are not required to request any transcript; if you do request a transcript, sections 6103 and 6109 and their regulations require you to provide this information, including your SSN or EIN. If you do not provide this information, we may not be able to process your request. Providing false or fraudulent information may subject you to penalties.

Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation, and cities, states, the District of Columbia, and U.S. commonwealths and possessions for use in administering their tax laws. We may also disclose this information to other countries under a tax treaty, to federal and state agencies to enforce federal nontax criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism.

You are not required to provide the information requested on a form that is subject to the Paperwork Reduction Act unless the form displays a valid OMB control number. Books or records relating to a form or its instructions must be retained as long as their contents may become material in the administration of any Internal Revenue law. Generally, tax returns and return information are confidential, as required by section 6103.

The time needed to complete and file Form 4506-T will vary depending on individual circumstances. The estimated average time is: **Learning about the law or the form, 10 min.; Preparing the form, 12 min.; and Copying, assembling, and sending the form to the IRS, 20 min.**

If you have comments concerning the accuracy of these time estimates or suggestions for making Form 4506-T simpler, we would be happy to hear from you. You can write to:

Internal Revenue Service  
Tax Forms and Publications Division  
1111 Constitution Ave. NW, IR-6526  
Washington, DC 20224

Do not send the form to this address. Instead, see *Where to file* on this page.

File #:	
Year:	2017
Date:	

TMK #

Name of Homeowner

Homeowner's Social Security Number

**Sources of Income:**

1. Wages, Salaries, Tips, Commissions, Bonuses, Fringe  
*Form 1040, Page 1 Line 7*
2. Interest Income (*taxable & non-taxable*)  
*Form 1040, Page 1 Line 8a; Schedule B*
3. Dividend Income (*total before exclusion*)  
*Form 1040, Page 1 Line 9a*
4. Taxable refunds, credits, or offsets to taxes  
*Form 1040, Page 1 Line 10*
5. Alimony received  
*Form 1040, Page 1 Line 11*
6. Business Gross Income (*before expenses*)  
*Enter all Schedule K-1's and/or Schedule C, Part I line 7*
7. Capital Gains (*enter "0" if loss*)  
*Form 1040, Page 1 Line 13; Schedule D*
8. Other Gains (*enter "0" if loss*)  
*Form 1040, Page 1 Line 14; Form 4797*
9. IRA, Keogh Distributions  
*Form 1040, Page 1 Line 15a; 1099-R line 1*
10. Pensions & Annuities  
*Form 1040, Page 1 Line 16a*
11. Supplemental Income
  - a. Gross Rental Income  
*Schedule E, Part I line 4, sum all columns (A, B, C, ...)*
  - b. Partnership and S Corporation Income  
*Schedule E, Part II line 32 (enter "0" if loss)*
  - c. Estate and Trust Income  
*Schedule E, Part III line 37 (enter "0" if loss)*
  - d. Real Estate Mortgage Investment Conduits  
*Schedule E, Part IV line 39 (enter "0" if loss)*
12. Farm Income (*enter "0" if loss*)  
*Schedule F, Part I line 9*
13. Unemployment Compensation Benefits  
*Form 1040, Page 1 Line 19*
14. Social Security Benefits  
*Form 1040, Page 1 Line 20a*
15. County's Allowable Adjustments to Gross Income
  - a. IRA, Keogh Contributions & Rollovers  
*Enter the rollover amount as negative*
16. Other Income not Reported Above  
*(discharge of debt, gambling, insurance settlement, etc...)*
  - a.
  - b.
  - c.

**INCOME FROM EACH HOMEOWNER (All Owners Listed on Property Title)**





--	--	--	--


**TOTAL GROSS INCOME OF EACH HOMEOWNER**

--	--	--	--

**TOTAL GROSS INCOME OF ALL HOMEOWNERS**

--

**MEETS INCOME REQUIREMENT:**

--

**ALLOWABLE HOUSEHOLD GROSS INCOME LIMIT**

\$100,000.00

**REVIEWED BY:**

--